



Grain Transportation Report

*A weekly publication of the
Transportation and Marketing Programs/Transportation Services Branch
www.ams.usda.gov/tmdtsb/grain*

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The next
release is
Dec. 9, '04

Agricultural Trucking Security Guide Now Available: The “*Guide for Security Practices in Transporting Agricultural and Food Commodities*” and a companion resources directory are now available. The guide offers voluntary security measures that can be utilized by commercial haulers of agricultural commodities and foodstuffs to assist trucking companies and their drivers in protecting facilities and vehicles. Funded and approved by the United States Department of Agriculture (USDA), the guide assists commercial transporters in evaluating vulnerability and threat potentials of agricultural and food commodities, including terrorist attacks.

Efforts to produce the guide began in the fall of 2003, when USDA partnered with the Agricultural and Food Transporters Conference (AFTC) of the American Trucking Associations (ATA) to survey the commercial agricultural and food transportation industry regarding post September 11 security issues and concerns and to develop a voluntary security management practices guide for the industry. The survey was distributed to more than 24,000 truck carriers by the American Transportation Research Institute (ATRI), questioning respondents about their security practices and concerns and evaluating steps that may be taken to protect both the driver and freight, as well as the integrity of the Nation’s food supply. Responses were also evaluated regarding the protection of populations along motorways that could be affected by the presence of hazardous materials in the environment, possibly caused by terrorist activity. The survey results helped in the development of the guide and identified additional security options aimed at enhancing protections already in place across the industry to safeguard people, property, products, processes, information, and information systems.

Commercial agricultural transporters move the vast majority of all agricultural commodities shipped daily throughout the United States. Agriculture and food provide 13 percent of the United State’s gross domestic product (GDP), 18 percent of employment, and \$140 billion in revenue. America’s trucking industry makes up 5 percent of GDP, and jobs related to the trucking industry employ 10.1 million people. The trucking industry’s gross revenue in 2003 was \$610 billion.

The release of the guide is especially timely, as fall brings increased transportation service demands with the agricultural harvest season and the start of preparations and deliveries for the winter holiday retail season. Both USDA and AFTC are developing outreach activities, especially with State trucking associations, to secure industry acceptance and utilization of the guide and resources directory. The guide is available electronically at the Agricultural and Food Transporters Conference (AFTC) of the American Trucking Associations (ATA) website at <http://www.truckline.com/NR/exeres/64F2C572-AF52-441F-8B56-F310C08758D4.htm> or in hard copy by contacting Fletcher Hall, Executive Director, AFTC, at 703-838-7999. Karl.Hacker@usda.gov

Grain Transportation Indicators

Table 1--Grain transport cost indicators*

Week ending	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
12/01/04	142	337	133	315	354
Compared with last week	unchanged	↓	↑	↑	↑

*Indicator: Base year 2000 = 100; Weekly updates include truck = diesel (\$/gallon); rail = nearby secondary rail market (\$/car); barge = spot Illinois River basis (index = percent of tariff rate); and ocean = routes to Japan (\$/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2--Market update: U.S. origins to export position price spreads (\$/bushel)

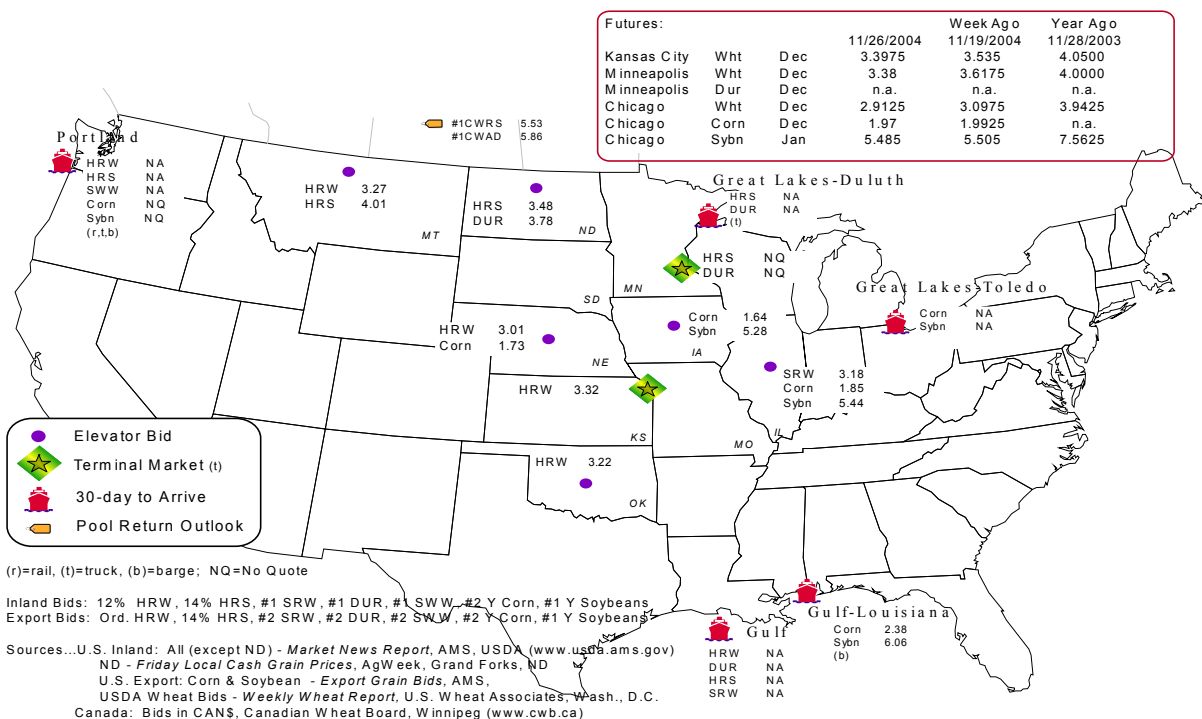
Commodity	Origin--destination	11/26/2004	11/19/2004
Corn	IL--Gulf	-0.53	-0.56
Corn	NE--Gulf	-0.65	-0.64
Soybean	IA--Gulf	-0.78	-0.81
HRW	KS--Gulf	n/a	-1.03
HRS	ND--Portland	n/a	-1.63

Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1
Grain bid summary



Rail Transportation

Table 3--Rail deliveries to port (carloads)*

Week ending	Mississippi Gulf	Texas Gulf	Cross-Border Mexico	Pacific Northwest	Atlantic & East Gulf	Total
11/24/2004 ^p	329	1,439	2,271	4,638	331	9,008
11/17/2004 ^r	260	1,425	1,645	4,586	826	8,742
2004 YTD	9,523	84,834	57,468	188,061	8,897	348,783
2003 YTD	14,194	77,741	41,600	138,197	17,060	288,792
2004 as % of 2003	67	109	138	136	52	121
Total 2003**	14,843	88,194	48,805	157,125	20,509	329,476
Total 2002	12,247	83,969	40,867	110,471	20,938	268,492

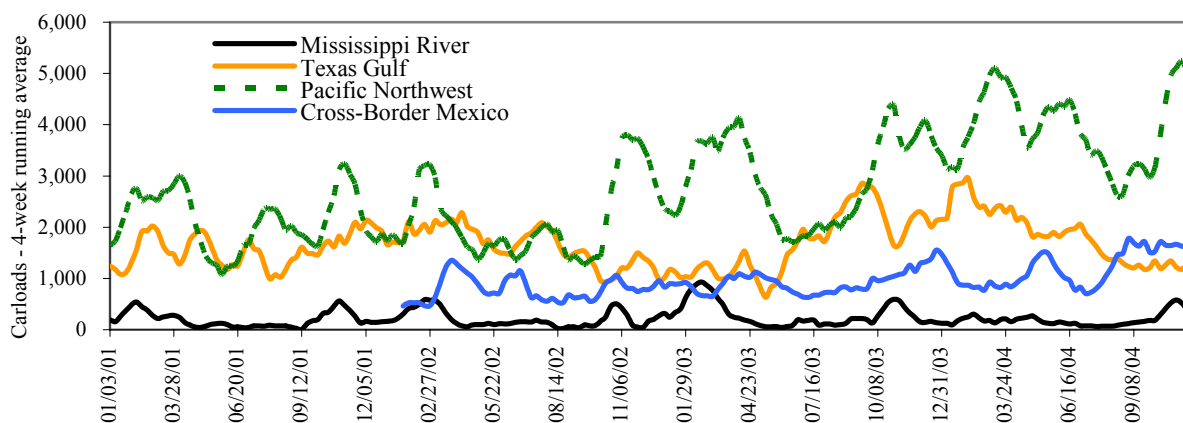
(*) Incomplete Data, as of 9/22/04, Cross-Border movements included; (**) Excludes 53rd week; YTD = year-to-date; p = preliminary data;
r = revised data

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 40 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

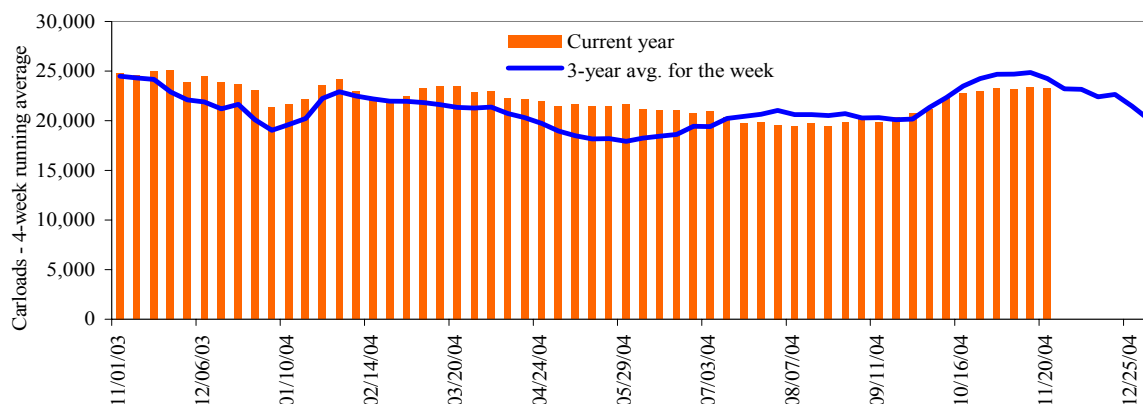
Rail deliveries to port



Source: Transportation & Marketing Programs/AMS/USDA

Figure 3

Total weekly U.S. grain car loadings for Class I railroads



Source: Association of American Railroads

Table 4--Class I rail carrier grain car bulletin (grain carloads originated)

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
11/20/04	3,310	3,960	9,128	574	5,941	22,913	4,650	4,960
This week last year	3,580	3,712	10,198	629	6,416	24,535	4,574	4,944
2004 YTD	126,886	150,967	405,407	24,819	294,213	1,002,292	209,310	184,672
2003 YTD	129,367	151,509	362,871	20,612	298,662	963,021	170,959	174,315
2004 as % of 2003	98	100	112	120	99	104	122	106
Total 2003*	146,395	171,260	416,371	24,506	336,079	1,094,611	197,993	198,185

Source: Association of American Railroads (www.aar.org); YTD = year-to-date; * Excludes 53rd week

Table 5--Rail car auction offerings, week ending 11/27/04 (\$/car)*

Delivery for:	Jan. 05	Feb. 05	Mar. 05
BNSF ¹			
COT/N. grain	no offer	\$134	\$92
COT/S. grain	no offer	\$213	\$213
UP ²			
GCAS/Region 1	no offer	\$139	no offer
GCAS/Region 2	no offer	\$281	no offer

*Average premium/discount to tariff, last auction

¹BNSF - COT = Certificate of Transportation

N includes: ID, MN, MT, ND, OR, SD, WA, WI, WY, and Manitoba, Canada.

S includes: CO, IA, IL, KS, MO, NE, OK, TX, NM, AZ, CA, UT, and NV.

²UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

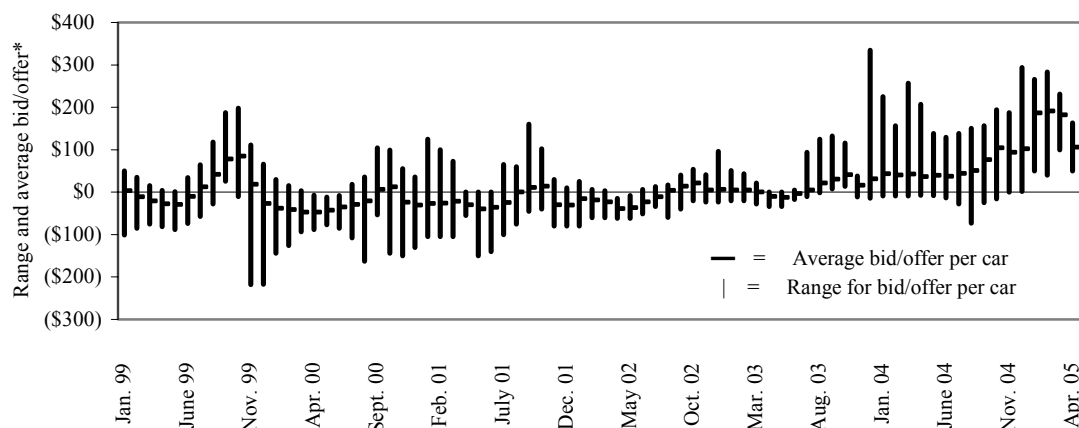
Source: Transportation & Marketing Programs/AMS/USDA

Rail service may be ordered directly from the railroad via **auction** for guaranteed service or tariff for nonguaranteed service or through the secondary market.

The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4

Secondary rail car market, delivery month-year



*up to 6 months of trading

Source: Transportation & Marketing Programs/AMS/USDA

Average bid/offer is the simple average of all the weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Range for bid/offer shows the range of average weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Table 6--Weekly secondary rail car market, week ending 11/26/04 (\$/car)*

	Delivery period			
	Jan. 05	Feb. 05	Mar. 05	Apr. 05
BNSF-GF	\$217	\$167	\$150	\$75
Change from last week	\$0	-\$16	-\$8	\$0
UP-Pool	\$266	\$275	\$228	\$158
Change from last week	\$10	\$8	\$0	\$0

*Average premium/discount to tariff, \$/car-last week

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,

Missing value = no bid quoted; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

Data from Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7--Tariff rail rates for unit and shuttle train shipments*

Effective date:					
11/1/2004	Origin	Destination	Rate/car	Rate/metric ton	Rate/bushel**
<u>Unit train*</u>					
Wheat	Minneapolis, MN	Houston, TX	\$2,120	\$23.37	\$0.64
	Kansas City, MO	Galveston, TX	\$1,920	\$21.16	\$0.58
	Minneapolis, MN	Portland, OR	\$4,148	\$45.72	\$1.24
	St. Louis, MO	Houston, TX	\$2,095	\$23.09	\$0.63
	Kansas City, MO	Laredo, TX	\$2,380	\$26.23	\$0.71
	Chicago, IL	Albany, NY	\$1,834	\$20.22	\$0.55
	Chicago, IL	Richmond, VA	\$2,002	\$22.07	\$0.60
Corn	Minneapolis, MN	Portland, OR	\$3,600	\$39.68	\$1.01
	Chicago, IL	Baton Rouge, LA	\$2,736	\$30.16	\$0.77
	Council Bluffs, IA	Baton Rouge, LA	\$2,270	\$25.02	\$0.64
	Evansville, IN	Raleigh, NC	\$1,791	\$19.74	\$0.50
	Council Bluffs, IA	Stockton, CA	\$3,606	\$39.75	\$1.01
	Kansas City, MO	Dalhart, TX	\$1,965	\$21.66	\$0.55
	Columbus, OH	Raleigh, NC	\$1,700	\$18.74	\$0.48
Soybeans	Des Moines, IA	Laredo, TX	\$2,930	\$32.30	\$0.82
	Minneapolis, MN	Portland, OR	\$3,610	\$39.79	\$1.08
	Chicago, IL	Baton Rouge, LA	\$2,736	\$30.16	\$0.82
	Council Bluffs, IA	Baton Rouge, LA	\$2,799	\$30.85	\$0.84
	Des Moines, IA	Laredo, TX	\$2,930	\$32.30	\$0.88
	Evansville, IN	Raleigh, NC	\$1,791	\$19.74	\$0.54
	Chicago, IL	Raleigh, NC	\$2,391	\$26.36	\$0.72
<u>Shuttle Train*</u>					
Wheat	St. Louis, MO	Houston, TX	\$1,895	\$20.89	\$0.57
	Minneapolis, MN	Portland, OR	\$3,993	\$44.01	\$1.20
Corn	Fremont, NE	Houston, TX	\$2,665	\$29.38	\$0.75
	Minneapolis, MN	Portland, OR	\$3,450	\$38.03	\$0.97
Soybeans	Council Bluffs, IA	Houston, TX	\$2,605	\$28.71	\$0.73
	Minneapolis, MN	Portland, OR	\$3,410	\$37.59	\$0.95

*A unit train refers to shipments of at least 52 cars. Shuttle train rates are available for qualified shipments of more than 100 cars that meet railroad efficiency requirements.

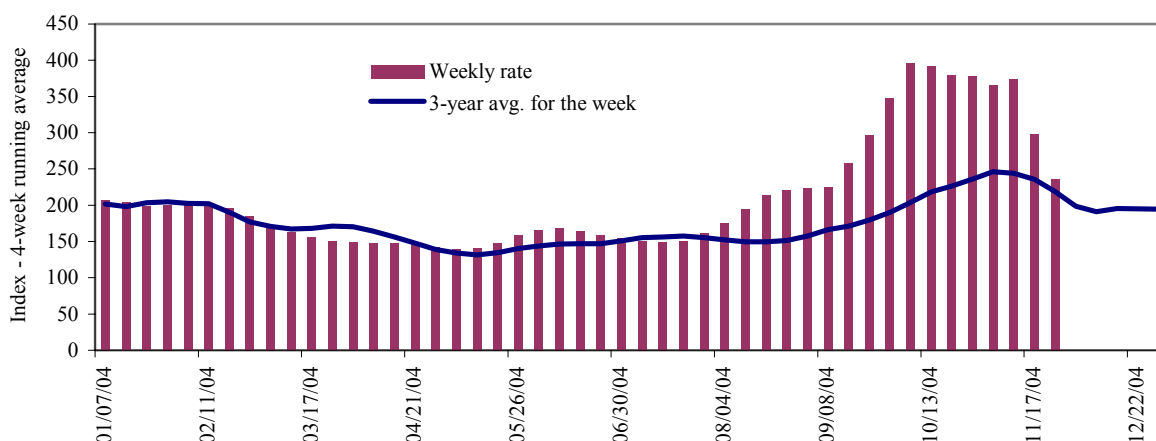
**Approximate load per car = 100 short tons: corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

Barge Transportation

Figure 5

Illinois River barge rate index - quotes



Note: Index = percent of tariff rate

Source: Transportation & Marketing Programs/AMS/USDA

The **Illinois River barge rate index** averaged 183 percent of the **benchmark tariff rates** between 1999 and 2001, based on weekly market quotes. The **index**, along with **rate quotes** and **futures market bids** are indicators of grain transport supply and demand.

Table 8--Barge rate quotes: southbound barge freight

Location	11/24/2004	11/17/2004	Dec '04	Feb '05
Twin Cities	255	303	0	0
Mid-Mississippi	244	295	0	0
Illinois River	236	298	240	242
St. Louis	180	264	184	191
Lower Ohio	208	308	202	198
Cairo-Memphis	171	255	169	173

Index = percent of tariff, based on 1976 tariff benchmark rate

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Benchmark tariff rates

Calculating barge rate per ton:

(Index * 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map (see figure 6).

Note: The Illinois barge rate is for Beardstown, IL, La Grange Lock & Dam (L&D 8).

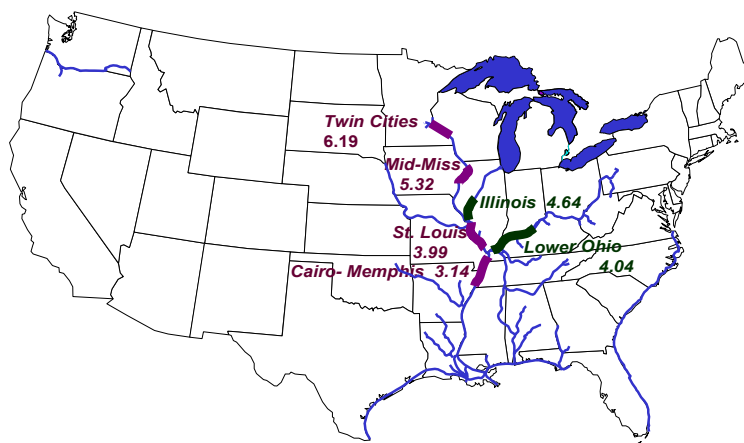
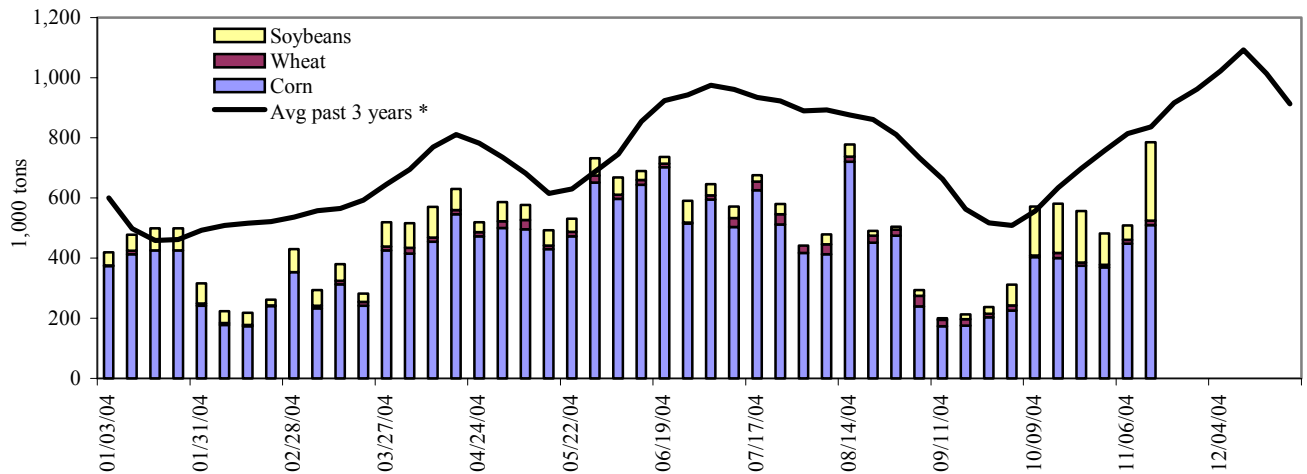


Figure 7

Barge movements on the Mississippi River (Locks 27 - Granite City, IL)

Source: Transportation & Marketing Programs/AMS/USDA, *-4week moving average

Table 9--Barge grain movements (1,000 tons)

Week ending 11/20/2004	Corn	Wheat	Soybean	Other	Total
Mississippi River					
Rock Island, IL (L15)	212	2	83	0	297
Winfield, MO (L25)	219	11	175	0	405
Alton, IL (L26)	430	14	248	2	694
Granite City, IL (L27)	463	13	229	2	706
Illinois River (L8)	143	3	60	8	214
Ohio River (L52)	69	7	184	2	262
Arkansas River (L1)	0	11	44	0	55
2004 YTD	22,805	2,527	5,131	679	31,142
2003 YTD	26,025	2,548	7,970	634	37,177
2004 as % of 2003 YTD	88	99	64	107	84
Total 2003	29,898	2,787	9,146	695	42,526

YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1.

"Other" refers to oats, barley, sorghum, and rye.

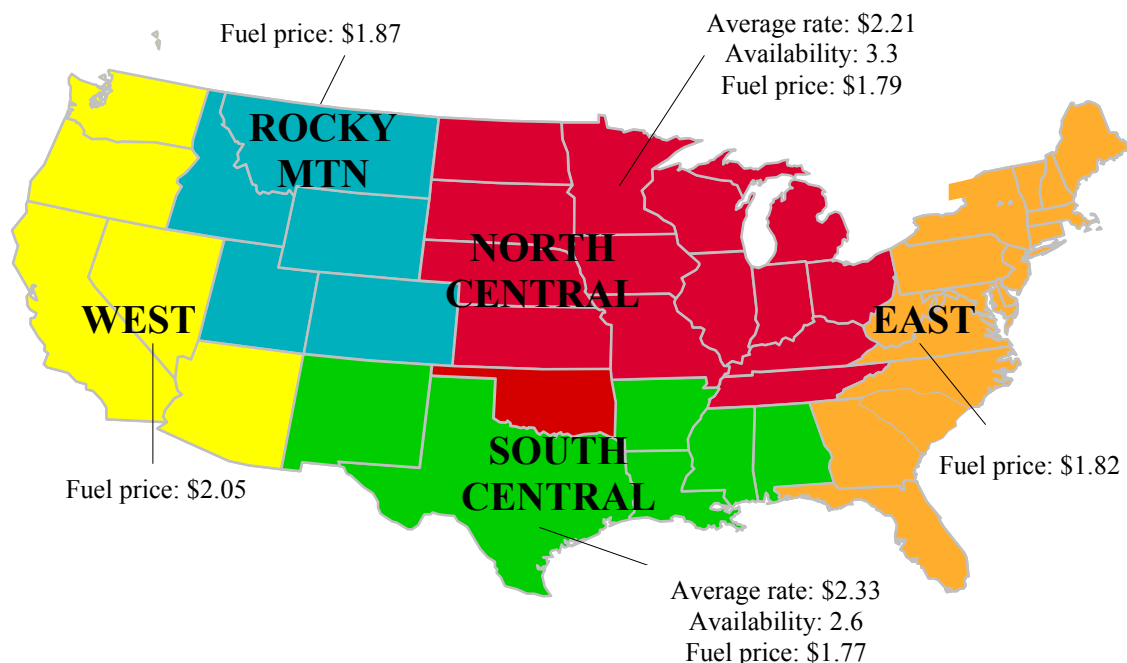
Source: U.S. Army Corp of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webbrpts/default.asp)

Note: Total may not add exactly, due to rounding

Truck Transportation

Figure 8

U.S. grain truck market advisory, 3rd quarter 2004*



*Average rate per loaded mile, based on truck rates for trips of 25, 100, and 200 miles

Note: Fuel prices are a quarterly average (unit per gallon)

Fuel price data source: Energy Information Administration, U.S. Department of Energy, www.eia.doe.gov

Table 10--U.S. grain truck market overview, 3rd quarter 2004

Region/commodity*	25 miles	100 miles	200 miles	Truck availability	Truck activity	Future truck activity
	Rate per mile			Rating compared to same quarter last year 1=Very easy to 5=Very difficult		
					1=Much lower to 5=Much higher	
National average¹	2.76	2.12	1.87	3.1	3.4	3.2
North Central region²	2.76	2.02	1.86	3.3	3.3	3.3
Corn	2.90	2.15	2.18	2.8	2.9	3.1
Wheat	2.43	1.92	1.68	3.6	3.5	3.3
Soybean	2.90	2.15	2.18	2.9	2.9	2.9
South Central region²	2.97	2.14	1.87	2.6	3.8	2.9
Corn	2.32	2.12	1.76	3.0	3.8	3.0
Wheat	3.07	2.05	1.81	2.7	3.8	3.0
Soybean	3.35	2.26	2.05	2.2	3.6	2.6

Rates are based on trucks with 80,000 lb weight limit

*Commodity averages based on truck rates for top producing states based on National Agricultural Statistics Service/USDA

¹National average includes: AR, CO, IA, IL, IN, KS, LA, MN, MS, ND, NE, OH, OK, OR, SD, TX, and WA.

²Commodity rates per mile include the average of the top 3 producing states within the region.

Source: Transportation and Marketing Programs/AMS/USDA

The weekly **diesel price** provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant expense for truck grain movements, accounting for 37 percent of the estimated variable cost.

Table 11--Retail on-highway diesel prices*, week ending 11/29/04 (US\$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.141	-0.002	0.657
	New England	2.258	0.000	0.653
	Central Atlantic	2.252	0.001	0.659
	Lower Atlantic	2.082	-0.004	0.656
II	Midwest	2.086	0.003	0.638
III	Gulf Coast	2.053	0.005	0.625
IV	Rocky Mountain	2.171	0.001	0.636
V	West Coast	2.233	-0.009	0.628
	California	2.287	-0.012	0.627
Total	U.S.	2.116	0.000	0.640

*Diesel fuel prices include all taxes.

Source: Energy Information Administration/U.S. Department of Energy (www.eia.doe.gov)

Grain Exports

Table 12--U.S. export balances (1,000 metric tons)

Week ending 1/	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
11/18/2004	1,726	560	1,219	735	90	4,331	9,141	6,786	20,258
This week year ago	2,854	593	937	950	150	5,483	10,601	10,346	26,430
Cumulative exports-crop year 2/									
2004/05 YTD	4,718	2,031	4,100	2,710	294	13,853	10,258	8,938	33,049
2003/04 YTD	5,857	2,034	3,428	2,026	602	13,946	10,219	8,393	32,558
2004/05 as % of 2003/04	81	100	120	134	49	99	100	106	102
2003/04 Total	12,697	3,785	6,928	4,889	1,053	29,353	47,704	24,102	101,159
2002/03 Total	6,896	2,899	6,645	3,517	720	20,677	39,646	28,908	89,231

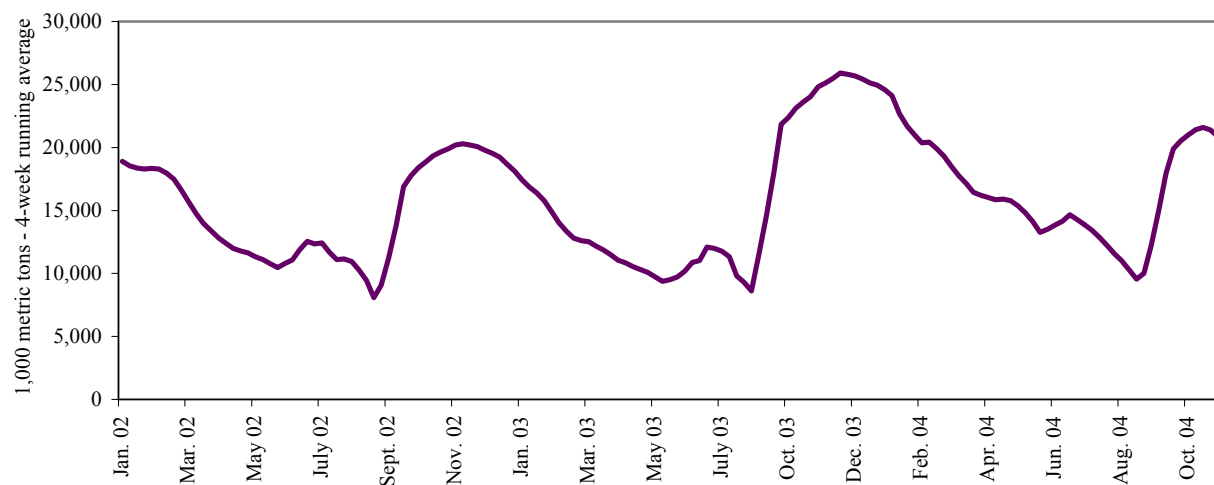
Note: YTD = year-to-date. Crop year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31, 1/ = Current outstanding unshipped export sales to date

2/ = New crop year in effect for corn and soybean sales

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Figure 9

U.S. grain, unshipped export balances (wheat, corn, and soybean sales)



Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

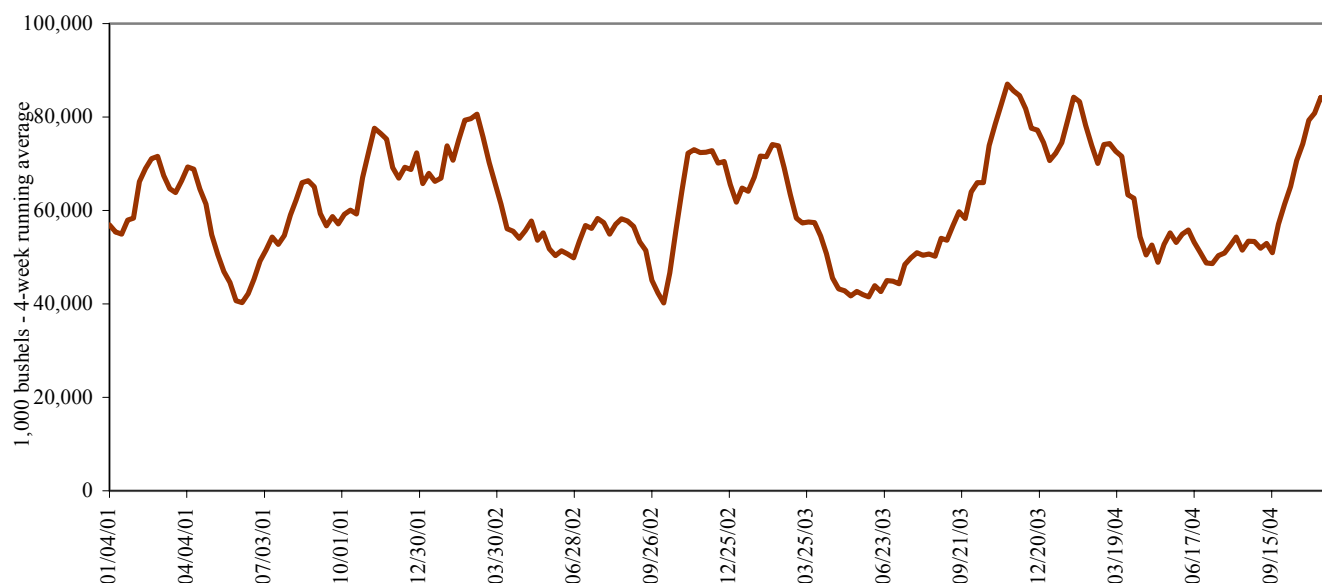
Table 13--Select U.S. port regions - grain inspections for export (1,000 metric tons)

Week ending	Pacific Region			Mississippi Gulf			Texas Gulf			Port Region total		
	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Pacific	Mississippi	Texas
11/25/04	130	125	174	82	496	657	90	0	0	429	1,235	90
2004 YTD	11,134	8,894	3,973	6,689	29,788	12,156	7,393	67	18	24,001	48,633	7,478
2003 YTD	8,206	4,914	4,740	5,624	27,913	17,020	6,316	176	60	17,859	50,557	6,551
2004 as % of 2003	136	181	84	119	107	71	117	38	31	134	96	114
2003 Total	8,764	5,450	5,141	5,883	30,903	19,374	7,011	229	69	19,355	56,160	7,309

Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa); YTD: year-to-date

The United States exports approximately one-quarter of the grain it produces. On average, it includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Over 60 percent of these U.S. export grain shipments departed through the Mississippi Gulf region in 2003.

Figure 10

U.S. grain inspected for export (wheat, corn, and soybeans)

Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa)

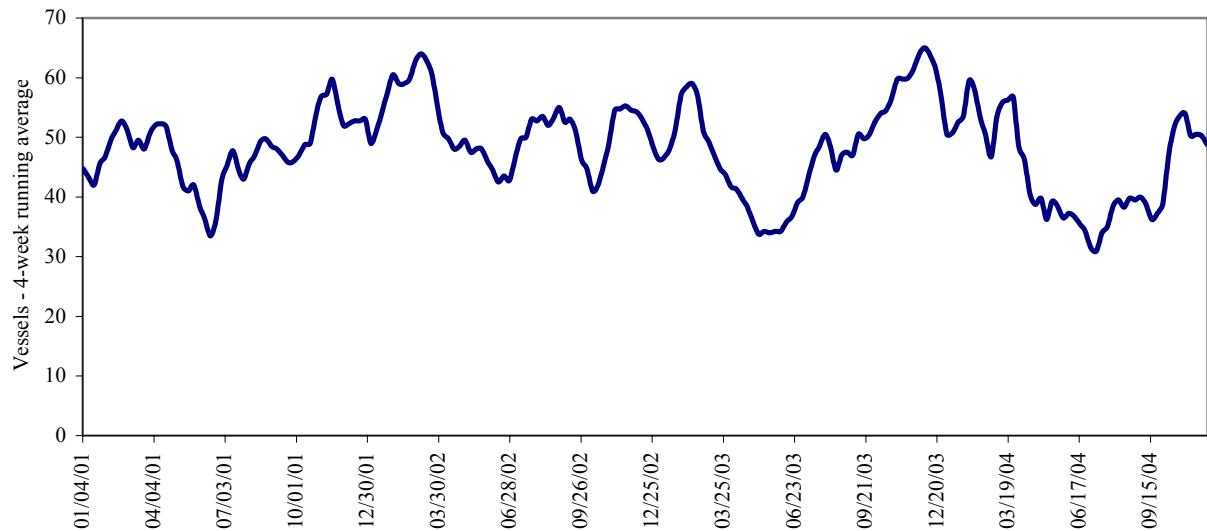
Ocean Transportation

Table 14--Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
11/25/2004	35	44	65	8	16
11/18/2004	31	49	67	9	18
2003 range	(11..47)	(30..76)	(39..93)	(3..13)	(1..15)
2003 avg.	31	49	62	9	6

Source: Transportation & Marketing Programs/AMS/USDA

Gulf Port grain vessel loading (past 7 days)



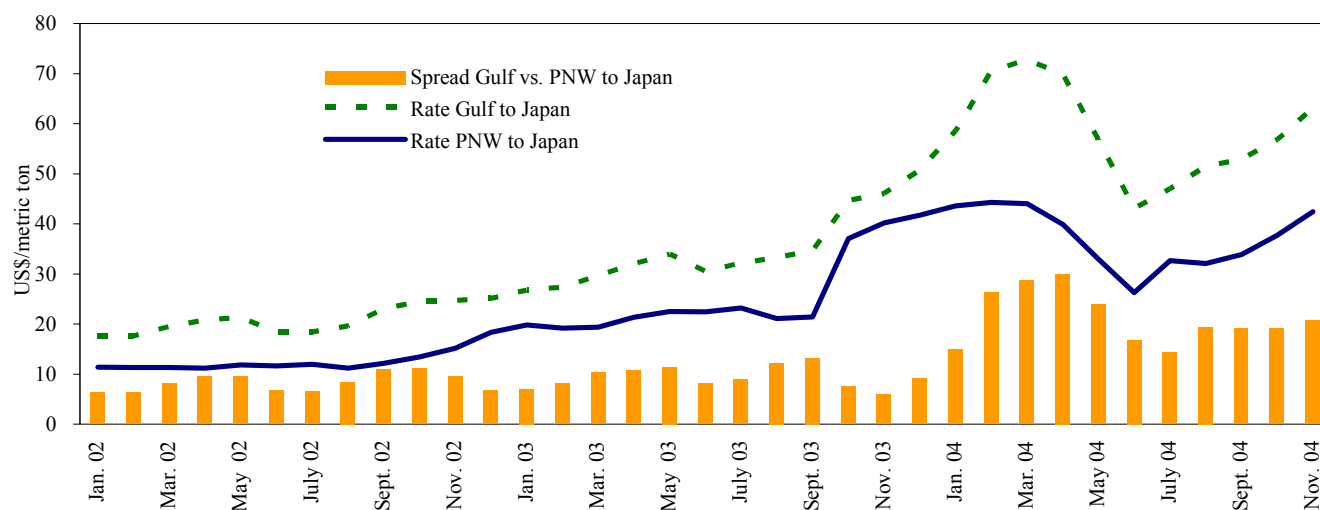
Source: Transportation & Marketing Programs/AMS/USDA

Table 15--Quarterly ocean freight rates (average rates & percentage changes) (US\$/metric ton)

Countries/ regions	2004 3rd qtr	2003 3rd qtr	Percent change	Countries/ regions	2004 3rd qtr	2003 3rd qtr	Percent change
Gulf to				Pacific NW to			
Japan	\$50.08	\$33.83	48	Japan	\$37.00	---	---
China	\$54.00	\$34.00	59	Argentina/Brazil to			
N. Europe	---	\$22.88	---	Med. Sea	\$46.92	\$24.50	92
N. Africa	---	\$25.50	---	China	---	\$34.75	---
Med. Sea	---	\$24.88	---				

Source: Maritime Research, Inc. (www.maritime-research.com)

Figure 12

Grain vessel rates, U.S. to Japan

Source: Baltic Exchange (www.balticexchange.com)

Table 16--Ocean freight rates for selected shipments, week ending 11/27/04

Export region	Import region	Grain	Month	Volume loads (metric tons)	Freight rate (\$/metric ton)
U.S. Gulf	Ecuador*	Wheat	Nov 15/25	21,000	52.93
U.S. Gulf	Japan	Hvy Grain	Nov 25/30	54,000	59.00
U.S. Gulf	Algeria	Corn & Meals	Oct 24/26	20,000	54.75
U.S. Gulf	China	Hvy Grain	Oct 25/31	57,000	52.25
U.S. Gulf	China	Hvy Grain	Nov 1/10	55,000	57.50
U.S. Gulf	China	Hvy Grain	Nov 5/15	57,000	55.00
U.S. Gulf	Japan	Hvy Grain	Dec 1/10	54,000	62.50
U.S. Gulf	Tanzania*	Maize	Oct 25/Nov 4	28,100	65.00
Norfolk	Latvia*	Wheatflour	Dec 10/25	3,320	65.00

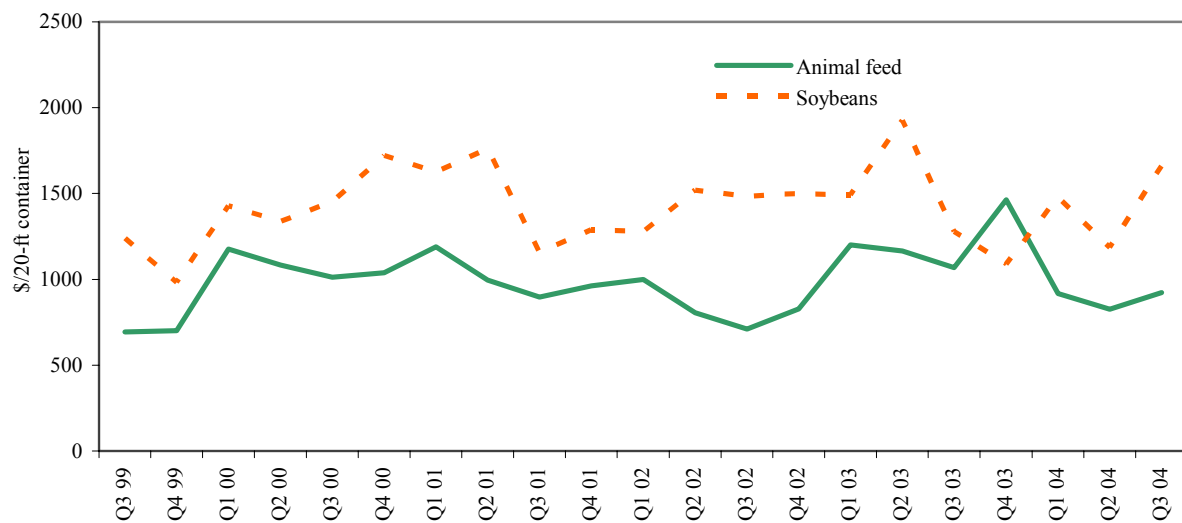
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

*Most food aid from the United States is required to be shipped on U.S. flag vessels. The vessels are limited in availability resulting in higher rates. In addition, destinations receiving food aid generally lack adequate port unloading facilities, requiring the vessel to remain in port for a longer duration than normal.

Source: Maritime Research Inc. (www.maritime-research.com)

Figure 13

Weighted average rates¹ for containerized shipments of animal feed and soybeans to selected Asian countries



¹ Animal Feed: Busan-Korea (15%), Kaohsiung-Taiwan (21%), Tokyo-Japan (39%), Hong Kong (22%), Bangkok-Thailand (3%) and soybeans: Busan-Korea (5%), Keelung-Taiwan (31%), Tokyo-Japan (64%)

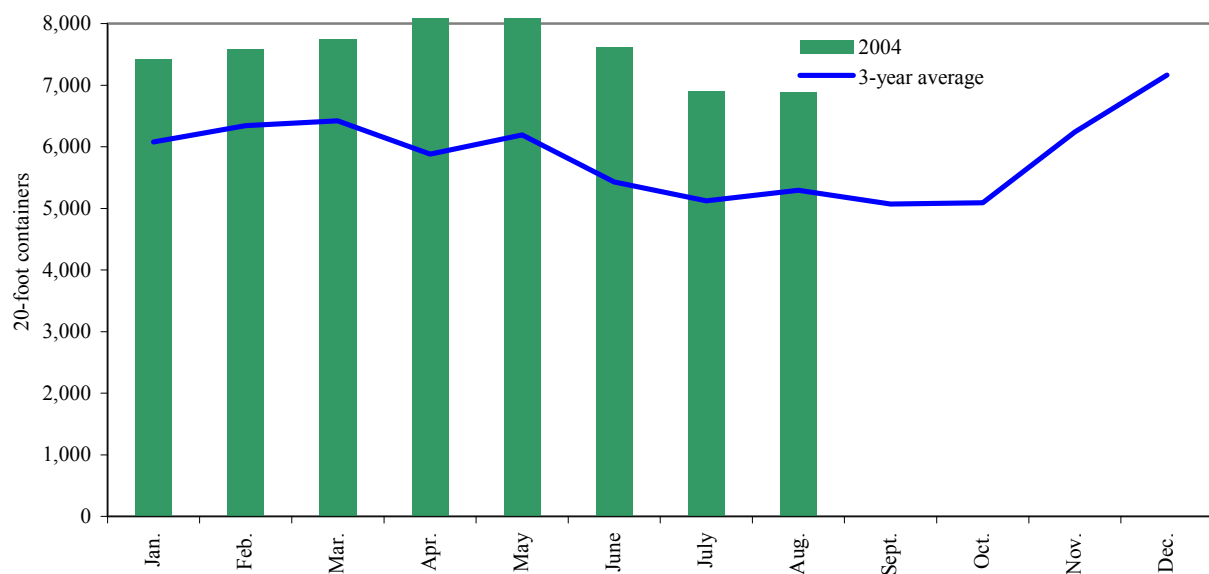
Quarter 3, 2004.

Source: Ocean Rate Bulletin, Transportation & Marketing Programs/AMS/USDA

Container ocean freight rates – average rate per twenty-foot equivalent unit (TEU) weighted by shipping line market share and trade route.

Figure 14

Monthly shipments of containerized grain for 2004 compared with a 3-year average



Note: PIERS data is available with a lag of approximately 40 days

Source: Port Import Export Reporting Service (PIERS), *Journal of Commerce*

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Related Websites

Agricultural Container Indicators
Ocean Rate Bulletin

<http://www.ams.usda.gov/tmd2/agci/>
<http://www.ams.usda.gov/tmd/Ocean/index.asp>

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